

## CityWide Money Management Program

The CityWide Money Management Program is a pilot program designed for seniors with dementia and/or memory loss who experience difficulty managing their money, organizing their finances, and paying bills on time. The program is supported by the DC Office on Aging through the Administration on Community Living, Alzheimer's Disease Initiative Grant. The Money Management Program is administered by Iona Senior Services for the benefit of District-wide Lead Agency case management clients. The program offers two levels of support: Money Management services and Organizational Representative Payee services.

**Money Management services** include home visits from the Money Management representative to assist with financial organization, budgeting, and bill payment reminders while the client remains in control of their finances.

**Organizational Representative Payee** services are designed for DC residents in need of extensive financial assistance, and allows Iona Senior Services to serve as the participant's Organizational Representative Payee. The participant's Social Security check is directly deposited into a dedicated account managed by Iona Senior Services. The Money Management Program facilitates the payment of the client's bills on their behalf and disburses money to the participant to purchase needed personal items. Participation in Representative Payee services requires medical certification completed by a physician indicating the participant is unable to manage their finances.

### Eligibility Requirements:

- DC resident
- 60 years of age or older
- Lives alone
- Experiences dementia and/or memory loss
- Yearly net income equal or less than \$29,425
- Countable assets equal or less than \$4,000

### Referrals will be accepted by Case Managers from the following:

- DC Office on Aging Lead Agencies
- Legal Counsel for the Elderly, Alternatives to Landlord Tenant Court Project

*\*Referring Case Managers must have completed a comprehensive assessment, established a working relationship with the client, and provide ongoing case management.*

To make a referral Case Managers should email a recent copy of the DCOA Universal Intake to Christine Kenny, LICSW, at [ckenny@iona.org](mailto:ckenny@iona.org). A Money Management Program representative will contact the referring Case Manager to complete the referral form within two business days. The initial home visit will be conducted in collaboration with the referring Case Manager.

**For additional questions, please contact Program Manager, Christine Kenny, LICSW (202-895-9405 [ckenny@iona.org](mailto:ckenny@iona.org)).**